Libraries
Connect
Communities 3

Executive Brief

Public Library Funding & Technology Access Study

by
American Library Association
Center for Library & Information Innovation, University of Maryland
Information Institute, Florida State University

www.ala.org/plinternetfunding

ALAAmericanLibraryAssociation

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Libraries have always been about the business of connecting communities of people with the resources and information they need in order to learn, explore, create and build success. Computers and the Internet have been a growing part of fulfilling this mission over the past 15 years. Libraries have emerged as community technology centers, providing free access to computers, the Internet, Wi-Fi, and trained staff that provide classes and informal assistance to help people gain the skills they need to succeed online.

On September 15, the American Library Association (ALA), the Center for Library and Information Innovation at the University of Maryland (UMCP) and the Information Institute at Florida State University (FSU) published Libraries Connect Communities 3: Public Library Funding & Technology Access Study. This report, the third in a series, offers the most current national data available on technology access and funding in U.S. public libraries and builds on work begun in 1994. The principal investigators for the study are Denise M. Davis (ALA Office for Research &Statistics), John Carlo Bertot (UMCP) and Charles R. McClure (FSU).

Enclosed is the executive brief for the study. The full report findings are freely available online at www.ala.org/plinternetfunding, or a bound copy may be purchased through the ALA Store at www.alastore.ala.org. Findings include:
- 71% of public libraries report that they are the only source of free public access to computers and the Internet in their communities;
- 80% of libraries provide hands-on assistance to patrons for understanding and using e-government resources – up 6% from the previous year;
- 90% of libraries offer formal or informal technology assistance to library users; and
- 80% of libraries do not have enough computers to meet patron demand at all times of the day.

This comprehensive report provides information that can help library directors and library IT staff benchmark and advocate for technology resources in communities across the nation. The data also provides policymakers, practitioners, library supporters, researchers, government and private funding organizations and other stakeholders a better understanding of the issues and needs that our libraries face in providing public access computing and Internet-based services and resources.

Please call or email Larra Clark, project manager, ALA Office for Research & Statistics, at 800-941-8478, ext. 8213, or lclark@ala.org if you have questions or would like more information on this research effort.

Sincerely,

Keith Michael Fiels
ALA Executive Director

Executive Brief

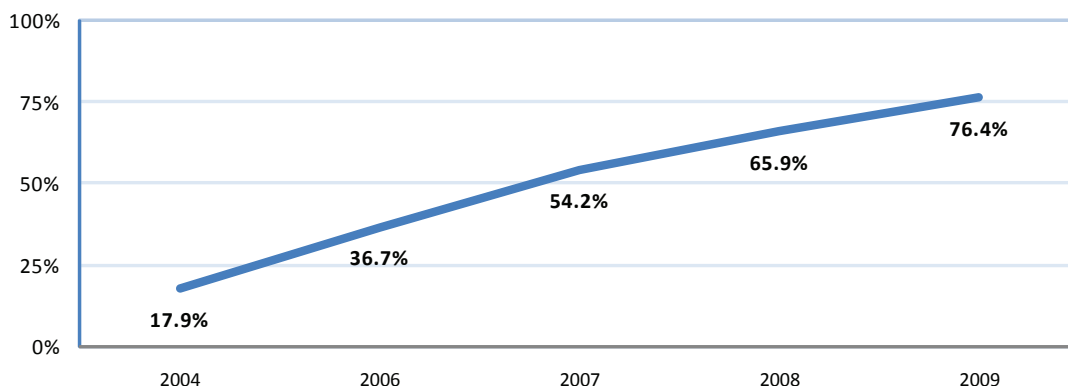## The State of Technology and Funding in U.S. Public Libraries in 2009

Libraries Connect Communities: Public Library Funding & Technology Access Study 2008–2009 (PLFTAS) marks the third year of the study, funded by the Bill & Melinda Gates Foundation and the American Library Association (ALA), and continues the research of previous surveys conducted by John Carlo Bertot and Charles R. McClure, with others, since 1994.[1] The study presents national and state data gathered through three integrated approaches: a national survey that collected information about public library Internet connectivity, use, services, funding and sustainability issues; a questionnaire sent to the Chief Officers of State Library Agencies (COSLA); and focus groups and site visits held in two states: Indiana and Wisconsin.

The study finds that America's 16,592 public library buildings provide communities of all sizes free access to computers and the Internet; formal classes and informal staff assistance using these technology assets; a wide range of Internet services including homework resources, digital reference and e-books; and wireless access to the Internet. Key findings include:

◗ Libraries serve a unique and important role in providing free access to all types of information and telecommunications services. Just over 71 percent of libraries report that they are the *only* source of free access to computers and the Internet in their communities. Library staff report an increase in the use of library computers and Internet access for job-seeking and e-government purposes.

◗ In a time of widespread economic turmoil, 14.3 percent of public libraries report decreased operating budgets in FY2009. Only 38 percent of libraries report budget increases at or above the rate of inflation. More than half (53 percent) of the state library agencies that provide state funding to public libraries report declining state funding in FY2009, according to questionnaires to the Chief Officers of State Library Agencies (COSLA).

◗ Public libraries are investing in and improving Internet access speeds, but they still find patron demands are growing faster than their ability to increase bandwidth. Nearly 60 percent of libraries report Internet connection speeds are insufficient to meet needs at some point in the day. Achieving sufficiency of public access to computers and the Internet is an elusive goal.

New data in this year's study include the number of IT full-time equivalents (FTE) per library branch, the length of time it takes library branches to return a public computer to service, types of formal IT training available in public libraries, state library roles in e-government efforts, state certification requirements for library staff, and state library support for public library trustees.

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1. Information about the reports from the 1994–2006 studies is available at: http://www.ii.fsu.edu/plinternet.

Figure A1. Public Wireless Availability, 2004 –2009

- 17.9% (2004)
- 36.7% (2006)
- 54.2% (2007)
- 65.9% (2008)
- 76.4% (2009)

Libraries Play Critical Technology Roles in Communities

"We see technology as a tool that enables our communities to more effectively and efficiently use the library. It's helping people do what they need to do – whether that's finding a book, doing research or looking for a job." (Wisconsin public library trustee)
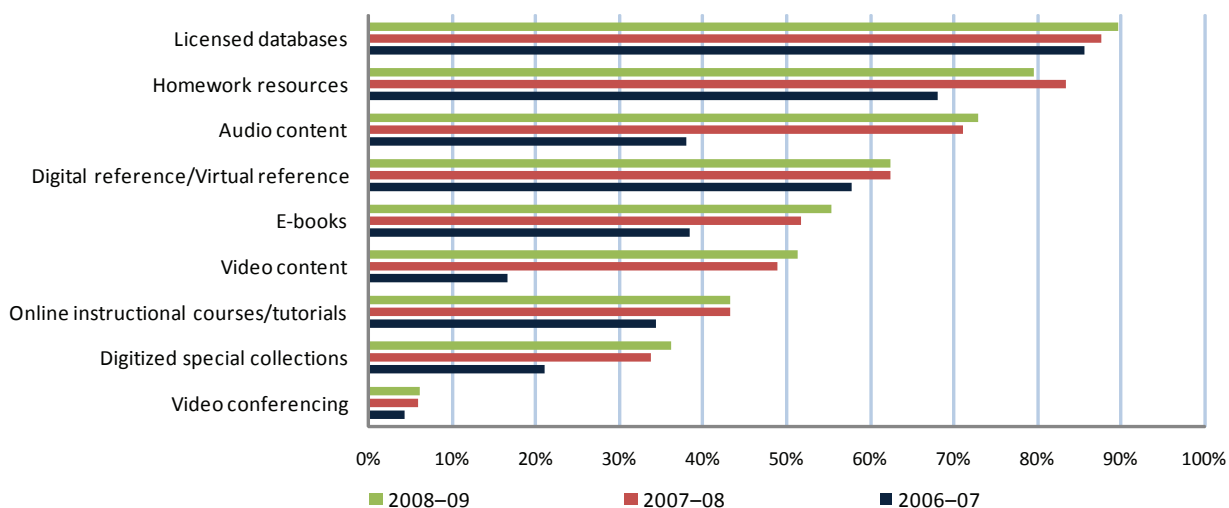
Technology helps libraries do what they do best: connect people to resources and ideas—including books, virtual reference, e-books and training. Thanks to technology and the Web, many libraries' resources are available 24/7, with online collections and databases, downloadable audiobooks, searchable catalogs and more accessible via the library Web site. Libraries remain a leading—if not singular—provider of free computer and Internet access in communities across the country. Nationally, 71.4 percent of libraries report that they are their communities' sole provider of free access, a number that increases to 78.6 percent for rural libraries.

The data are particularly important when considered with information about home Internet use. About 62 percent of U.S. households report Internet use at home, but use varies dramatically among household types.[2] For families with an income under $24,999, the percentage of home Internet use drops to 25 percent. The rate in Black and Hispanic households drops to 44.9 percent and 43.3 percent, respectively. While 70.7 percent of employed households maintain Internet service in the home, the number drops to 55.6 percent for unemployed people and 44.3 percent for those not in the labor force. As unemployment grows and household incomes drop, public access Internet services at libraries increase in value and importance.

Libraries also offer faster Internet connection speeds than many residents may be able to afford at home. Seventy percent of public libraries report Internet connection speeds of 1.5Mbps (T1) or faster, up from 64.6 percent in 2007–2008. Libraries are able to serve more patrons with wireless access to the Internet. More than 76 percent now offer free Wi-Fi access, up from 66 percent last year (Figure A1). Public libraries provide critically important Internet access within a context that allows patrons to use multiple library resources online and in print. As a 2008 Institute of Museum and Library Services report found: "Nowhere else is such capability available from a single provider."[3]

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2. National Telecommunications and Information Administration, "Networked Nation: Broadband in America 2007," National Telecommunications and Information Administration. 2008 www.ntia.doc.gov/reports/2008/NetworkedNation.html.
3. Griffiths, José-Marie and Don King. *Interconnections: The IMLS National Study on the Use of Libraries, Museums and the Internet.* 2008. Univ. North Carolina, Chapel Hill, NC.

Figure A2. Public Library Internet Services Available to Users, 2007–2009

Service	2008–09	2007–08	2006–07
Licensed databases	90%	88%	86%
Homework resources	80%	84%	68%
Audio content	73%	71%	38%
Digital reference/Virtual reference	62%	62%	57%
E-books	56%	52%	39%
Video content	51%	49%	17%
Online instructional courses/tutorials	43%	43%	34%
Digitized special collections	36%	34%	21%
Video conferencing	6%	6%	4%

In addition to free public access to computers and the Internet, libraries provide their communities with robust electronic collections. Ninety percent of libraries offer licensed databases, which provide access to articles from thousands of newspapers and periodicals; practice tests for the GED, SAT, civil service exams and more; genealogy resources; and business and medical information. Online homework resources and audio content also are offered by more than 70 percent of public libraries (Figure A2).

At 78.7 percent, education resources and databases for K–12 students top the list as the Internet service most critical to the role of the public library, followed by services to support job-seekers at 65.9 percent (up almost 4 percent from last year and 20 percent from the 2006–2007 study).

In every state visited as part of this multi-year study, library staff members have reported an increased use of library computers and Internet access for job-related purposes. Even before the recession began in December 2007, librarians saw the impact of the growing number of online-only job applications for a range of employment—including service and entry-level positions that require no computer skills, such as housekeeping or stocking shelves. Many patrons need assistance learning basic skills, including using a mouse, establishing an e-mail account and basic word processing in order to apply for work.

Ninety percent of libraries offer formal technology classes or informal point-of-use assistance for library patrons using library computers. Among public libraries that offer formal technology training, about 27 percent report offering classes in accessing online job-seeking and career-related information. Libraries in high poverty communities are most likely to offer formal

▶ *Ninety percent of libraries offer formal technology classes or informal point-of-use assistance for library patrons using library computers.*

training, and 40 percent of these libraries report offering job-related classes. The most common classes being offered illustrate the role public libraries play in serving first-time computer users, with general Internet use, general computer skills, general online searching and general software use leading all others.

E-government—including filing for unemployment benefits—also has been a growing area of use for library public access computing. Almost 81 percent (up from 74 percent last year) of public libraries indicate that their staff members provide as-needed assistance to patrons for understanding how to access and use government Web sites, programs and services. More than two-thirds of all states provide online forms or applications for permits and licenses, tax forms, Department of Motor Vehicle renewals, state government jobs and unemployment benefits, according to a 2008 questionnaire to the Chief Officers of State Library Agencies (COSLA). Five of 46 states that responded to the questionnaire report that unemployment forms may be filed *only* online.

▶ *Almost 81 percent of public libraries provide assistance to patrons accessing and using e-government resources.*

Among computer users interviewed during site visits to libraries in Indiana and Wisconsin, the vast majority report weekly use of library computers and Internet access. This is more frequent than what interviewed patrons reported in past visits to eight other states during the last two years.

A January 2009 survey of U.S. households conducted for the American Library Association by KRC Research & Consulting confirmed anecdotal reports and national trends in visits to public libraries. Sixty-three percent of households—or roughly 136.6 million people—reported that they had used their library in the previous 12 months. While the number of people visiting libraries has been stable over the past decade, the frequency of use increased from previous household surveys for both in-person visits and virtual library use. Nationally, this translates into increases of about 25 million in-person visits, more than 11 million virtual library visits and over 4 million telephone calls to public libraries annually.[4]

Library Buying Power Erodes

"All we've heard is that if you think this year is bad, wait until next year. So I'm hoping that we can just hold steady at 2008 levels." (Wisconsin library director)

Even in a good economy, small or no year-to-year increases in operating funds challenge libraries to maintain and grow services. Resources become even more strained in a poor economy when use increases and operating budgets often shrink. While the 2008–2009 data were collected before many of the most serious impacts from the recession were felt by libraries, declining and level funding patterns are evidenced in this year's study.

Downward shifts in funding occurred in libraries previously experiencing increases in the 2.1-to-4 percent and 6-or-more percent ranges. Notably, fewer high poverty libraries reported increases and more reported decreases in operating budgets in FY2009 compared with FY2008; more urban and suburban libraries reported level funding between FY2008 and FY2009—4.5 percent more in each area.

For the first time in this multi-year study, libraries report a decline in new (less than one year old) public access computers. The number of libraries that experienced large increases (more than 6 percent) in technology-related expenditures fell from 10.4 percent in FY2009 to 5.8 percent in FY2010. Urban libraries saw the most significant decline in large technology budget increases, dropping to 5.3 percent of urban libraries in FY2010 from 15.4 percent in FY2009 . Medium and low poverty communities saw similar declines, each dropping by nearly 50 percent in FY2010. The decline in technology spending anticipated for FY2010 could mean that the drop in numbers of computers in libraries in fall 2008 (when the survey was completed) may continue into next year.
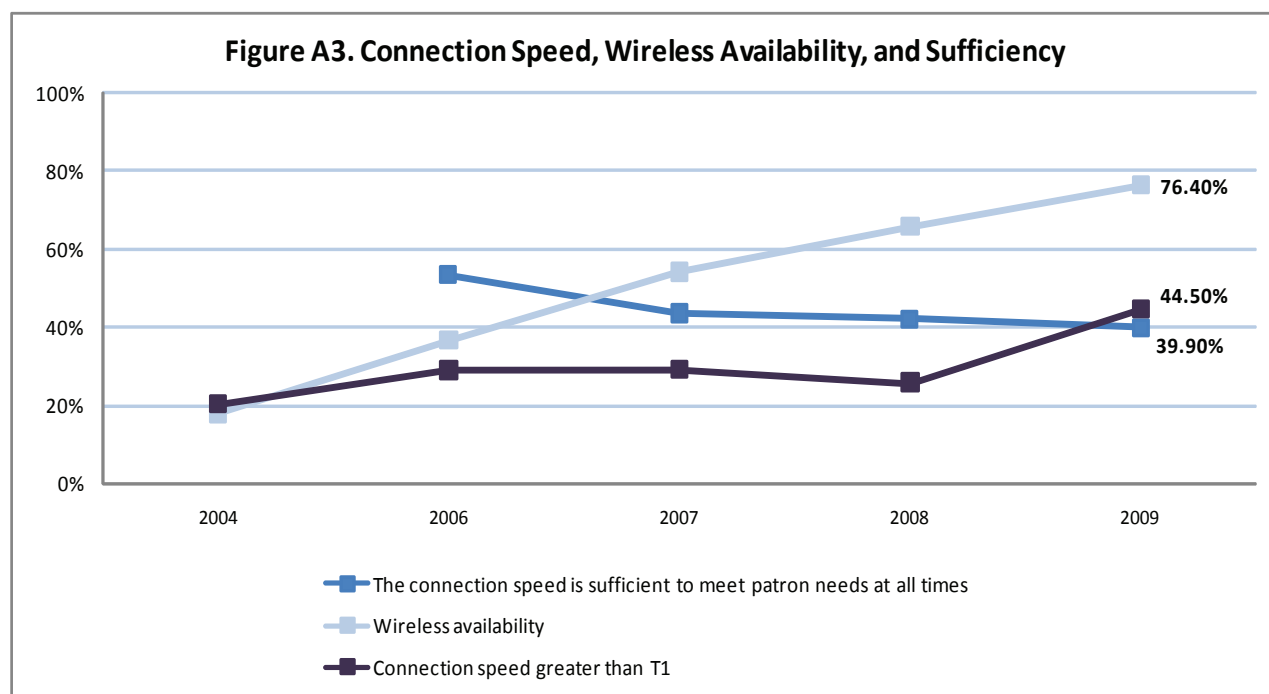
▶ *Urban libraries saw the most significant decline in large technology budget increases (more than 6 percent), dropping to 5.3 percent of urban libraries in FY2010 from 15.4 percent in FY2009 .*

4. American Library Association Office for Research & Statistics. Research Survey Results, Executive Board Document #12.46. April 25, 2009. http://www.ala.org/ala/aboutala/governance/officers/ebdocuments/documentinventory0809.cfm.

These declines follow several years of libraries' reporting level funding or small increases. A 2006 ALA study about mid-year budget reductions indicated level funding for fiscal years 2003–2005,[5] as reported by between 77 percent and 82 percent of libraries; about 58 percent of libraries also anticipated level funding in FY2006. At the same time, inflation rates for fiscal years 2003–2006 ranged from 2.3 percent in 2003 to 3.2 percent in 2006. Inflation continued to rise at similar rates in 2007 and 2008—2.8 percent in 2007 and 3.8 percent in 2008. The cumulative change from 2003–2008 is 31.3 percent.[6] The downward funding trends, combined with increases in personnel, benefits and facilities operations costs, further erode public libraries' buying power.

Information provided by local libraries is complemented by data collected from the Chief Officers of State Library Agencies (COSLA). Findings from multiple contacts with state libraries between December 2008 and May 2009 show that 53 percent of states that provide funding to public libraries report a decline in that funding in FY2009.

Libraries mitigate some of the shrinking budget with "on behalf of" support for technology-related expenditures provided by local government agencies and networks and cooperatives. "On behalf of" support includes services paid directly by another government office or entity *for* the library (e.g., IT technicians, equipment purchases, etc.) These services make a difference in funding. Urban libraries report the highest level of local government support for any technology expenditure by almost two-to-one compared with that reported by suburban and rural libraries. Hardware/software support from local government departments is 2.5 times more than that received by rural libraries, and nearly twice as much as suburban libraries. When considering "on behalf of" support by poverty levels, libraries in high poverty communities benefit somewhat more than their counterparts in low or medium poverty areas regardless of the external funding source (e.g., local, county, etc.). This may point to a more coordinated effort in deploying technology in urban, high poverty communities.

Figure A3. Connection Speed, Wireless Availability, and Sufficiency

Legend:
- The connection speed is sufficient to meet patron needs at all times
- Wireless availability
- Connection speed greater than T1

Data labels: 76.40%, 44.50%, 39.90%

5. Davis, Denise M. *Funding Issues in U.S. Public Libraries, Fiscal Years 2003–2006*. (March 10, 2006). http://www.ala.org/ala/aboutala/offices/ors/reports/fundingissuesinuspls.pdf.
6. U.S. Department of Labor. Bureau of Labor Statistics. *Consumer Price Index. All Urban Consumers (CPI-U, U.S. city average*. ftp://ftp.bls.gov/pub/special.requests/cpi/cpiai.txt).

The Elusive Nature of Providing Quality Public Access

> **"At one time, we would have said a T1 was just the world, but it just changes too fast. We went from a T1 to two T1s to three T1s to now 15 megabits of fiber."(Indiana library director)**

The 2008–2009 study shows conflicting results that raise a range of questions about the degree to which quality public access can be ensured in the future. On the one hand, public libraries continue to offer enhanced public access computing and Internet access services to their communities. As noted earlier, more libraries now offer wireless access to the Internet; have faster Internet access speeds; offer patrons a range of technology and Internet training; provide a range of Internet services; and assist patrons in applying for or accessing vital e-government services. Thus, public libraries provide critical public access computing and Internet services that support their communities in a wide range of areas.

On the other hand, public libraries indicate they often are unable to meet patron demand. At the same time that 70 percent of libraries report connection speeds of 1.5Mbps or faster (up from 64.6 percent in 2007–2008), nearly 60 percent of respondents (up from 57.5 percent) indicate connectivity speeds are insufficient to meet patron needs some or all of the time (Figure A3).

The disparity in connection speeds between urban libraries and their rural counterparts is pronounced. About one-third of rural libraries have connection speeds less than 1.5Mbps, compared with 7.1 percent of urban libraries and 15 percent of suburban public libraries. Rural libraries also have seen no growth in access speeds greater than 10Mbps over the past three years. Three times as many urban libraries (23.9 percent) as rural libraries (7.9 percent) offer Internet speeds greater than 10Mbps. Urban libraries, however, are more likely to report insufficient capacity to meet heavy patron demand.

Libraries also report:

▶ The number of public access computers is inadequate: More than 81 percent of libraries report they have insufficient availability of workstations some or all of the time.

> ▶ *More than 81 percent of libraries report they have insufficient availability of workstations some or all of the time.*

▶ Limits have been placed on the use of public access workstations: Just over 94 percent of libraries have imposed time limits on their workstations. Of those libraries, nearly 70 percent (67.6 percent) have time limits of 60 minutes or less, and nearly 25 percent (22.4 percent) have time limits of 30 minutes.

▶ Costs, space and buildings are barriers to the public access environment of public libraries: More than three-quarters of libraries (77.4 percent) report that cost factors influence their decisions to add public access workstations/laptops, while 75.9 percent cite space limitations and 34 percent report the inadequacy of their building infrastructure (e.g., cabling, wiring, electrical outlets).

▶ Libraries do not universally have schedules for public access workstation/laptop replacements or additions: Nearly 40 percent (38.2 percent) of public libraries report that they do not have a replacement or addition schedule for their public access computers.

▶ Libraries rely on non-professional IT staff for technology support: About 63 percent of libraries report that non-IT public service staff or library directors support their technology. This percentage climbs to 74.6 percent for rural libraries and drops to 36.8 percent for urban libraries. Overall, 42.3 percent of libraries support their IT with system-level IT staff, but only 28.7 percent of rural libraries have access to such support, as compared to 72.2 percent of urban libraries.

The significance of these findings is that many libraries continue to face challenges in maintaining and enhancing their public access technology environment *in spite of upgrades to their technology infrastructure*. Indeed, the two earlier studies identified these same issues. And, more importantly, libraries continue to offer a significant amount of services to the communities that they serve—licensed databases, technology

training, e-government and more—while often remaining as the only free public access point within their communities.

Call to Action

"If you had 100 computers, you could fill them all. They are always busy. We're also one of the few places in town that has Wi-Fi." (Indiana library trustee)

The 2008–2009 survey suggests that many of the themes and issues identified in previous years remain unaddressed. Funding is not keeping up with costs in many libraries. Older library buildings do not provide the space or infrastructure to house more computers. More technically trained librarians are needed. A majority of libraries report Internet access speeds and available computers are inadequate to meet patron needs some or all the time. Significant disparities between urban and rural libraries exist in terms of connectivity, services, staffing and funding. Despite these issues, the range and extent of Internet-based services provided by public libraries continues to grow.

The 2008–2009 data were collected in fall 2008, before many of the most serious financial impacts from the recession affected public libraries. Since then, the media has reported many stories about cuts in public library funding and layoffs of library staff in especially hard-hit states such as California and Florida.[7] Yet at the same time, significantly more patrons are coming to the public library to find employment assistance, complete government forms and obtain current housing and market information—all of which require Internet public access workstations and help from library staff.

Data from the next annual *Public Library Funding & Technology Access Study* (to be collected in fall 2009) will occur within the context of two significant events. The first is a predicted continuation of the recession and its likely impacts on public agencies, including public libraries. The second is the $7.3 billion in economic stimulus from the American Recovery and Reinvestment Act (ARRA) targeted at enhancing America's broadband infrastructure—of which a minimum of $200 million is set aside for public access centers, including public libraries.

Given findings from this study and the evolving context for the coming years, a number of actions could help improve the public library's public access computing and information technology infrastructure. Libraries can:

◗ *Document the range and extent to which public access computing services, resources and programs are used.* Along with national- and state-level data collected through this study, libraries benefit when staff can describe the benefits, impacts and outcomes of their services, resources and programs, both for the community and for individuals. Identify key indicators of these services, collect the necessary data and maintain summary statistics. Anecdotal stories and examples of how public access computing made a difference in people's lives can be as useful as statistics.

◗ *Increase local community awareness of the importance of the public library and Internet–based services in difficult economic times.* Libraries need to publicize the full extent of the services, resources and programs they provide. They especially need to make this known to community leaders and government officials. In site visits and focus groups, library directors and trustees report they are challenged to market and publicize the range of technology resources available and how these resources can best be leveraged by community members.

◗ *Engage in a carefully developed assessment of broadband capacity needs and develop a plan to obtain and use additional capacity.* The ARRA broadband economic stimulus program for FY2009 and FY2010 ensures that some public libraries will have the opportunity to obtain significantly increased broadband capacity. The issue of "sufficiency" depends on thoughtful answers to a number of questions: What is "sufficient"

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7. American Library Association. Public Library Funding Updates. http://www.ala.org/ala/issuesadvocacy/libfunding/public/index.cfm.

or "high quality" public access for a particular library to meet user needs in a specific community? How best should the library use this additional capacity and what specific applications and services should the library provide?

▶ *Establish a plan to document the impacts and outcomes from ARRA-funded broadband capacity increases.* Libraries that obtain support from ARRA for increased broadband capacity and related information technology infrastructure need to be prepared to demonstrate that such national support *does* make a difference and that future similar programs targeted to public libraries *will* make a difference. ARRA's broadband capacity improvement for public libraries might be seen as a prototype for future national funding programs for libraries.

▶ *Rethink delivery and organization of public access computing services, resources and programs.* This rethinking process includes expanding the role of consortia and increasing collaborations and partnerships that can better leverage economies of scale, while maintaining or increasing the quality of network-based services. Examples include cooperative broadband purchasing or a statewide e-government Web portal of resources, services, training and related programs. Such a Web portal could be jointly developed among public libraries, state and local government that would be available to all public libraries in the state, rather than developed piecemeal by individual libraries.

The economic upheaval of the past year is both a challenge and an opportunity for U.S. public libraries. State and local deficits, declining property and sales tax revenue and losses in endowments threaten library services at the same time these services are in greater demand. Public libraries cannot continue to do more with less; it is likely that in the near term a number of libraries will have to do *less* with less.

> ▶ *The economic up-heaval of the past year is both a challenge and an opportunity for U.S. public libraries.*

At the same time, however, libraries have re-emerged as an essential community service in this time of crisis. Libraries are providing a safety net for newly unemployed persons seeking new computer skills, knowledge in how to use the Internet for searching and applying for jobs, and research in new career opportunities. In at least five states, applicants must file online for unemployment benefits.

Employment, educational and government resources are increasingly available online only. Public libraries are uniquely positioned to provide physical meeting space, trained information professionals, computer and Internet resources and even an escape with free access to fiction, music, DVDs, public programs and games.

Action needs to be taken now to increase public awareness and support for these services, so that public libraries can recover the resources lost during this economic downturn and better support the nation's public access computing and Internet needs.
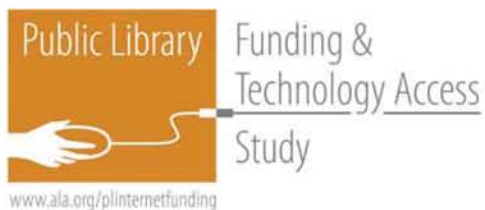
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In addition to the annual report of findings from the Public Library Funding & Technology Access Study, the study research team develops and publishes topical briefs related to issues affecting communities' access to technology in our public libraries. Find these short reports online at: www.ala.org/plinternetfunding

*U.S. Public Libraries and E-Government Services***:** U.S. public libraries are on the front lines of connecting people with essential online government resources – including unemployment benefits, federal and state emergency assistance, tax filing and more. Eighty percent of libraries provide hands-on assistance to patrons for understanding and using e-government resources.

*Supporting Learners in Public Libraries***:** The public library is a key agency in supporting the educational and learning needs of every person in the community. Libraries offer vital resources for early literacy development, homework help, homeschool families, continuing education and lifelong avocations.

*Job-Seeking in U.S. Public Libraries***:** Library staff in 10 states report increased use of library computers for job-seeking as more and more employers – from grocery stores to casinos to state governments – require people to apply for jobs online. Americans are depending on libraries not only for free access to computers and the Internet, but also for the assistance and training library staff offer every day.

*Internet Connectivity in U.S. Public Libraries***:** Today's public libraries are thriving technology hubs that millions rely on for Internet access. In addition to providing free access to computers and the Internet, the majority of public libraries offer Wi-Fi access, digital reference and downloadable media. As online services and programs become more sophisticated, the need for higher Internet access speeds for libraries grows.

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